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ABSTRACT

Career motivation is an important aspect of career planning for managers experiencing the challenges and stresses of mid-life career issues. Data from the Management Progress Study, the Bell System's 24-year longitudinal study of the lives and careers of managers, were analyzed to document changes in career motivation over time and to relate career planning to the career motivations of mid-life managers. Results show early declines in favorableness of expectations about one's career and desires for advancement, making promotions a less sought-after goal for career planning. Developmental increases in desires for achievement and autonomy point to the importance of challenge, responsibility, and authority in jobs for middle-aged managers, but resistance to geographical relocation may restrict lateral transfer opportunities. Prime candidates for career planning in middle age appear to be the future executives who are still motivated for upward mobility and willing to make personal sacrifices. (Author)

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CAREER MOTIVATION IN MID-LIFE MANAGERS

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Slide 1

Organizations recently have begun to realize the importance of human resources planning to better prepare them for a rapidly changing future. Many writers have pleaded for input from the individual as part of this procedure, a step known as career planning. It is not the purpose of this paper to evaluate the overall importance of career planning, but to consider its relationship to the career motivations of middle-aged managers.

Although a career is likely to cover the major part of the adult life span, career planning is typically thought of as an activity for young people. Application of the idea to mid-career employees typically assumes either that age doesn't matter or that the narrowing promotional pyramid will propel middle-aged managers into the depths of a mid-life crisis, leaving them depressed, disturbed and sapped of the juices of work motivation (Levinson, Darrow, Klein, Levinson & McKee (1979). Career planners operating under the first assumption nudge the middle-aged employee to make plans and dreams as if there were all the time and room in the world for them to come true. Career planners with the second assumption wring their hands and search for ways to widen the promotional pyramid or send employees to new locations to rekindle flames they fear have been let die. We believe both these approaches to career planning for middle-aged managers are in error because the assumptions on which they are based are in error.

Our beliefs stem from research with telephone company managers conducted in the Bell System for the last 24 years. The primary source of data is the Management Progress Study, the Bell System's first longitudinal study of the lives and careers of managers. The schedule of the Management Progress Study and its sample size at various points are shown on the slide. A total of 422 participants were put through an initial three-day assessment center during the five-year period from 1956 through 1960. The participants were 274 college graduates newly hired into management and 148 non-college people

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hired for non-management jobs but promoted into management before the age of 32. All were considered potential candidates for middle management; since this was the late 1950's, this particular criterion meant, unfortunately, that all were white males.

The original assessment center consisted of interviews, simulations, group discussions, paper-and-pencil tests, and projective measures. The information from these exercises was integrated in staff sessions, where multiple assessors rated the participants on 26 dimensions and made predictions about their future with the company. In the seven years that followed, participants were interviewed annually and administered questionnaires of their expectations and attitudes, while various company representatives were questioned independently about the men's performance and observed characteristics. Since the study has been strictly confidential basic research, neither participants nor company representatives were privy to information about each other.

At the eighth year of the study a reassessment was conducted, again lasting three days and using identical or parallel instruments to the initial assessment. By then about 40% of the college graduates had left the company, although almost none of the non-college people had departed. The total sample at Reassessment was a little over 300.

The study schedule slowed down a bit after Reassessment, since changes in the men's careers were coming less frequently, and interviews with participants, bosses, and terminators were conducted every three years. The most recent wave of research data was collected with a third assessment center, again for three days, at the 20th year of the study. These last MPS:20 assessments, focusing on mid-life and mid-career, are just now being completed, and 270 men remain in the active sample. The college graduates

presently have an average age of 44 and are typically at the 3rd of our seven levels of management, though the range is from 1st to 6th. The non-college men are typically 49 years old and at the 2nd level of management, with a range from 1st to 4th.

An advantage of a longitudinal study is the opportunity to trace the rate and degree of changes that occur over time. One instrument used to evaluate career motivation is the Expectations Inventory, which looks at hopes and dreams for a managerial career as well as their realization. The items on this questionnaire concern various aspects of managerial life, including advancement, salary progress, intellectual stimulation from peers, access to company information and resources, and geographical desirability of work location. The Expectations Inventory was first administered to the Management Progress Study participants at the original assessment, when they were asked to speculate five years ahead and predict what their managerial lives would be like. The Inventory was readministered with the interviews that followed in each of the next seven years, initially asking for speculation to the five year point and later asking for descriptions of current circumstances. After year 7, the Expectations Inventory was not administered again until year 20.

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Average scores in each administration of the inventory are shown on the slide. (The scores are for the same individuals across time; those who left the company before the MPS:20 assessment have been eliminated.) The major point illustrated here is that disillusionment sets in early. Although the young managers began with very high expectations of what their lives would be like and how successful their careers would be, each of the first few years brought them closer and closer to reality. By year 5 they had a fairly clear view of what life as a Bell System manager would be like.

Scores for the college group changed little from year 5 to year 20; the non-college group paralleled the college group for the first seven years but lapsed into greater negativism by year 20, reflecting their lesser career success.

To focus the Expectations Inventory scores more directly on career success, let us consider responses to the item "I am advanced about as rapidly as my interest and ability warrant." At the original assessment, 84% of the participants responded favorably to this question, indicating they believed it was likely to be true in the future. Seven years later, less than half (46%) stated that this was true. Thus the shape of the pyramid and its translation into advancement rates for these men were already well realized quite early in the game. The major drop had occurred by year 5, when the non-college men had an average age of 34 and the college recruits were only 29. Thus it would be difficult to argue from these data that a realistic career appraisal suddenly came with a mid-life crisis in the mid-40's.

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What they expect and what they want may not necessarily coincide, however. Desires for further promotions are reflected in ratings of Need for Advancement made by assessors who heard all the available information from each assessment exercise. The slide shows the percentage of participants with a modal rating of at least 4 on a five-point scale for the dimension Need for Advancement. Among the 112 college men who have gone through all three assessment centers to date, 43% had been rated high on Need for Advancement at the original assessment, and 40% still got this rating at the reassessment 8 years later. By year 20, however, only 29% were rated "4" or "5" on this assessment dimension, a significant drop. Among the 125 non-college men completing the three assessments, the big drop had occurred by year 8, when only 18% seemed to be strongly desirous of further promotions. Thus advancement desires also diminished with time.

For a rough approximation of when advancement drives die among managers, these figures should be put in an organizational perspective. Among the Bell System's 50,000 managers, nearly 80% do not have college degrees. This varies by level, of course, with the non-college people predominating at the 1st and 2nd levels of management. But if career planning is addressed to the total population, one would have to conclude that planning directed toward advancement in management would get a cool reception among most managers by their mid 30's.

Both expectations and advancement desires seem to fade gradually, gracefully, and for most fairly early. By the time of the MPS:20 interviews, most middle-aged participants have long ago given up their early dreams, and many couldn't even remember how high they had aspired in the beginning. Although one could still argue for repression or cognitive dissonance reduction, at least on the surface most of the men had accepted their career plateaus and adjusted to them. Mid-life was a crisis to some of our participants, but not to the majority.

Aside from adjusting to the reality of the career plateau, many participants had sound reasons for not wanting further promotions, even if they were available. A major problem is that promotions frequently are accompanied by geographical relocation. Respondents indicated on questionnaires at MPS:20 that as the number of job-required moves had increased in the past, the number of unfavorable reactions to them increased, especially on the part of the family. At middle-age, nearly half thought a proposed future move would evoke an unfavorable reaction, even if a promotion went with it. Other reasons for resisting further promotions were revealed in our MPS:20 interviews, such as not wanting the aggravations of the additional responsibility another management level would attain, or not liking the politics they feel they would have to endure at a higher level. One should not assume, then, that the absence of further promotional opportunities will be a personal tragedy.

There are also reasons why the organization may not want employees to be looking ever upwards and actively engaged in career planning to this end. Not everyone has the ability to perform the job at the next higher level. At the original assessment centers the assessment staff made predictions of whether each participant would make the third level of management within the first 10 years. Among the non-college group about the right number of mostly the right men had risen this far by the end of 16 years. Among the college group, an optimal number of promotions had occurred by year 8; by the time 16 years had passed, nearly all the qualified men had been moved up to third level, but so had nearly two-thirds of those rated low in potential. To open up the gates for even further advancements to middle management among middle-aged college graduates would seem to invite greater and greater mediocrity.

All these data point to several conclusions with respect to career planning for middle-aged managers. Our advice is "Don't inveigle the system to dangle promotions in front of those who don't really want them and those the organization shouldn't really want at higher levels". Another lesson is, "Don't feel too sorry for those who have plateaued". Many have reached the level to which they aspired, and others are frankly relieved they don't have to. Others have adjusted to the inevitable many years before, gradually and gracefully. Still others are at least able to muster up enough defense mechanisms to keep them from crashing into the despondencies claimed to plague the middle-aged. Perhaps most important, at MPS:20 the correlation of management level with assessment ratings of "Happiness" was .06, conspicuously non-significant. Career success isn't everything; on the average, these men were just as happy with it or without it (Bray & Howard, 1980).

If promotions are no longer that much of a reward for the typical middle-aged manager, to what ends might mid-careers be planned? Some clues come from scales of the Edwards Personal Preference Schedule, a self-report measure of motivations administered at the three Management Progress Study

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assessment centers. One scale, Motivation for Achievement, measures the desire to do a difficult job well and achieve on challenging tasks; no mention is made of advancement as a reward on this scale, rather the emphasis is on task accomplishment. Average scores are represented by the bar graphs on the slide in comparison to a norm group of 585 college recruits hired into entry level management in the Bell System in 1958.

At Study Year 0, the original assessment, the average score of both the college and non-college men hovered near the midpoint of the norm group. Average scores for these same two groups of assesses went up significantly by year 8 and were maintained at the MPS:20 assessment, with the college men now at the 82nd %ile and the non-college men at the 74th. With respect to motivation to respond to job challenge, then, there was no diminution with middle age, regardless of job level. These results argue for career plans that will enhance opportunities for job challenges and task accomplishment, even though they may be at the same management level.

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Another motivational change observed over time with the MPS participants is reflected in the Edwards scale of motivation for Autonomy, or desire to be free and independent. This slide shows the same groups of participants measured against the same normative standards as on the last slide. The increase in motivation for autonomy for both the college and non-college participants was notable by the time of the reassessment at year 8, but increased even more in the next 12 years. With average scores at the 85th %ile for the college men and 87th %ile for the non-college, this group of middle-aged managers would obviously respond to jobs that could provide more freedom to do as they please.

Career planning efforts in the direction of expanding opportunities for achievement and autonomy without necessarily involving a promotion suggest a system that is rich in opportunities for lateral transfers. There is one precaution attached to such a plan of action, however -- transfers are

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very likely to be resisted if they involve geographical relocation. When the MPS:20 participants were asked their feelings about relocations for a lateral transfer, as shown on the slide, full 3/4 of them replied that their feelings would be negative. Family resistance can be quite strong, especially when teenage children don't want to leave their schools and friends, and wives are rooted in the community. In addition, it is difficult to come out ahead financially; even the most liberal company relocation plans involve unforeseen costs and problems that are exacerbated in these times by high inflation and skyrocketing mortgage interest rates. Since the average move costs the organization about \$30,000 per year, neither is this a step for the company to take lightly.

If transfers without relocation are difficult to come by, an alternative may be enlarging the scope of the current assignment. Here, of course, much more than career planning by the individual would be needed, although individual efforts may be a good place to start. There would also have to be a willingness on the part of supervision to allow more scope in individual jobs, and it may not be possible to do this without affecting other people's jobs.

We are now left with career planning for middle-aged managers that is without promotion, without relocation, without bothering other people's jobs or supervision too much, but leading to opportunities for achievement and autonomy. If these aren't enough restrictions, there is one additional precaution. If jobs are rich in responsibility and authority, so that there are ample opportunities to meet individuals' achievement and autonomy needs, will they also require sacrifices of personal time from the individual? If so, this may be an additional hazard to career planning with middle-aged people.

Evidence for the relative importance of work in the men's lives was drawn from the various personal interviews with the Management Progress Study participants through the years. These interviews were coded by a clinical psychologist for the relative importance of nine life themes, such as marriage and family, religion, community service, recreational and social pursuits and occupational involvement. The average occupational life theme codes, meaning involvement in Bell System work, are shown by management level as of the 19th year on this slide.

Slide 8

It is readily apparent that occupational involvement as a dominant theme in life is highly related to career success. Though the men were undifferentiated at the original assessment, as early as the first year it was already becoming clear who was turning on and moving up. The differences between the groups continued to spread as the years went by.

One critical thing to observe in this slide is the evidence for disengagement, or withdrawal from job involvement (Schein, 1978). For those who ended up at the bottom of the pile, at the first and second level, the process of disengagement began almost immediately, when they were in their early 30's. For those at level 3, disengagement began after 10 to 13 years, when they were in their late 30's. Those who reached 4th level and beyond still had not withdrawn by their mid-40's. Thus when individual managers disengage from occupational involvement is a function of both age and relative career success.

An implication of diminishing primacy of work is that the job is becoming less important in the individual's total life, and other themes, such as the family or hobbies, are becoming more important. If asked to sacrifice personal time to work activities, there is likely to be great resistance from those with diminished occupational life themes, and they are in the majority.

Contrary to other writers (Schein, 1978), our data do not suggest that lower primacy of work means lack of interest in challenge, however. As long as even the lower level men are putting in their hours, they would like them to be absorbing, meaningful hours. They just don't want to go beyond their 40 per week.

Career planning for middle-aged managers has its share of obstacles, then, both in the structure of the organization and the motivations, abilities, and personal lives of individuals. But before giving up the ship entirely, it is important to recognize that we have been speaking of the majority and averages when there are individual differences. In large organizations, most middle-level managers are middle-aged, and it is from this group that a few will emerge as the top management of the future. They are those who have a career with a capital "C" and for whom career planning may be highly appropriate. It is important, then, to consider their characteristics with career planning activities in mind.

The Bell System recently made efforts to identify potential officers of the company from 4th and 5th level managers across the various telephone companies and to help prepare them for their presumed future responsibilities with a month-long executive development course. The first two groups of managers in the Bell Advanced Management Program, or BAMP, were administered many of the same questionnaires taken by the middle-aged Management Progress Study participants. A comparison of the characteristics of the two samples is shown in the slide. The BAMP managers were a little younger than the MPS participants on the average (41 years compared to 47 for MPS) and had somewhat less tenure (17 years compared to 20 for MPS). Most of the BAMP managers were white males, although there was one minority male and five white females.

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Slide 10

The BAMP managers knew well that their careers had not plateaued--just being sent to the program by their companies meant that good things were in store. When asked on a questionnaire, "How soon do you expect your next promotion to occur?", almost all of them saw a promotion within the next three years; in contrast, only 21% of the MPS men anticipated this and 62% thought they would never get another promotion.

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Promotions were also important to most of the BAMP group. When asked to evaluate the importance of advancing one more level, more than half said it was extremely or very important compared to only 16% of the MPS participants. In fact, more than $\frac{1}{4}$ of the BAMP participants wanted two more promotions, compared to only 4% of the MPS group. Ambition was not dead, then, among the high-flying middle-aged managers in the BAMP sample.

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The BAMP managers were also willing to make some sacrifices for career advancement. In contrast to the relatively low levels of willingness among the MPS group, half or more of the BAMP managers were willing to spend more time on the job, working at home, or taking course work if they thought it would

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lead to career success. They were also more willing to relocate, but only if a promotion were involved. For just a lateral transfer, they made a chameleon-like change out of the costumes of ambitious upwardly mobile executives-to-be and into the worn togs of middle-aged managers. In terms of motivation for achievement and autonomy, they achieved the same high levels as the Management Progress Study middle-aged managers. Their primacy of work was quite high, and most rated their business careers as one of the most important things in their lives.

It is to people like the BAMP managers that career planning efforts can be most profitably realized. The organization needs them in higher positions and has them available; the individuals want to go there. They expect and

aspire to higher levels and are willing to put in the time and effort to develop their careers in those directions. Furthermore, as middle-aged individuals, they will respond to the challenge of further assignments and enjoy the autonomy and control which can be associated with planning their own careers.

In conclusion, career planning may well be a worthwhile effort for middle-aged managers, but mostly for that slim minority that has the ability, motivation and opportunity to advance to higher rungs of the corporate ladder. But even for this group, allowance must be made for age and career stage. For to incorporate needless relocations in the career planning process can meet with resistance and scorn by the middle-aged and their families.

To the majority of middle-aged managers, however, corporate realities suggest that career planning is likely to be seen as meaningless, bureaucratic busywork. For most men in their middle and late forties, the notion that they engage in career planning activities directed toward achieving an eventual promotion is likely to be met with a response like, "Who do you think you're kidding?" If the activity could be tied to adding to the challenge or individual control in a job at the same level, it might be much more positively received, providing it didn't call for too big a price to be paid, like working at home or moving. But if there is much organizational resistance to job enlargement, job swapping, or lateral rotation, it may be better to let middle-aged sleeping dogs lie.

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CAREER MOTIVATION IN MID-LIFE MANAGERS

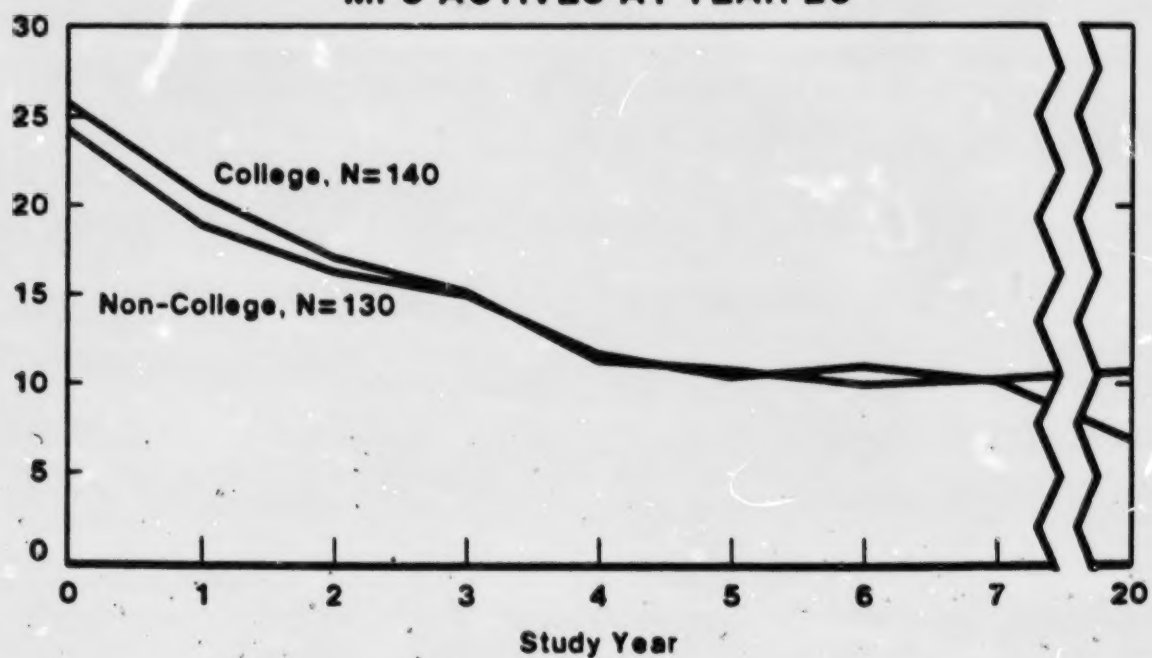
MANAGEMENT PROGRESS STUDY

SCHEDULE AND SAMPLE

<u>Year</u>		<u>Sample Size</u>		<u>Total</u>
		<u>College</u>	<u>Non-College</u>	
<u>0</u>	Assessment	274	148	422
1-7	• Annual Interviews With Participants, Company Representatives • Annual Expectations And Attitude Questionnaires			
8	Reassessment	167	142	309
10-19	• Tri-Annual Interviews With Participants, Bosses, Terminators • Tri-Annual Biographical Questionnaires			
20	MPS:20 Assessment (Midlife And Mid-Career)	140	130	270

EXPECTATIONS INVENTORY AVERAGE SCORE

MPS ACTIVES AT YEAR 20



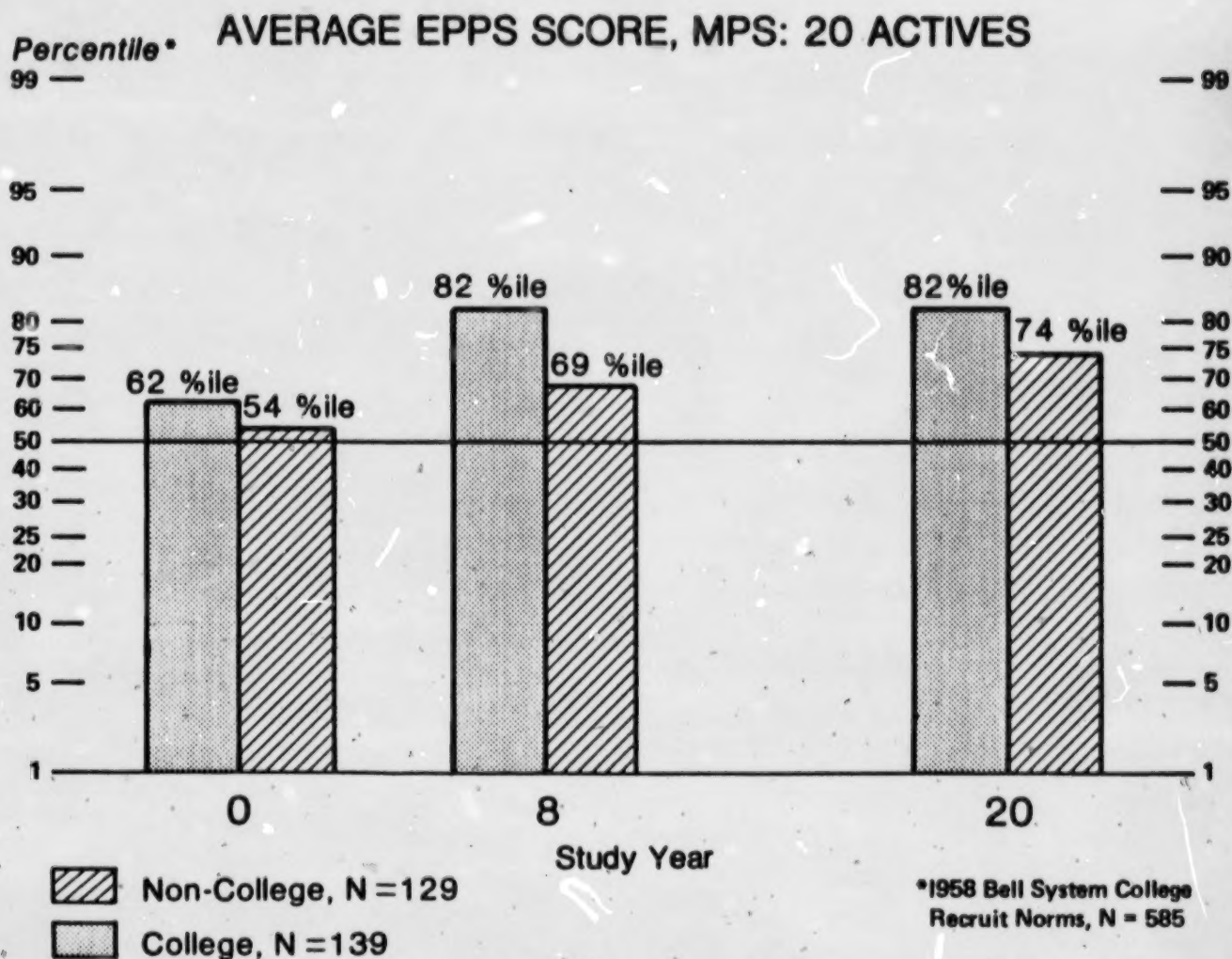
NEED FOR ADVANCEMENT - % RATED HIGH AT ASSESSMENT CENTERS

MPS ACTIVES AT YEAR 20

	<u>College</u>	<u>Non-College</u>
Asmt.	43%	34%
Reasmt.	40%	18%
MPS:20	29%	16%
N	112	125

MOTIVATION FOR ACHIEVEMENT

(To Do A Difficult Job Well)



MOTIVATION FOR AUTONOMY

(To Be Free And Independent)

AVERAGE EPPS SCORE, MPS: 20 ACTIVES

Percentile*

99 —

— 99

95 —

— 95

90 —

— 90

80 —

— 80

75 —

— 75

70 —

— 70

60 —

— 60

50 —

— 50

40 —

— 40

30 —

— 30

25 —

— 25

20 —

— 20

10 —

— 10

5 —

— 5

1 —

— 1

53 %ile

60 %ile

71 %ile

79 %ile

85 %ile

87 %ile

0

8

20

Study Year



College, N = 139



Non-College, N = 129

21

*1958 Bell System College
Recruit Norms, N = 585

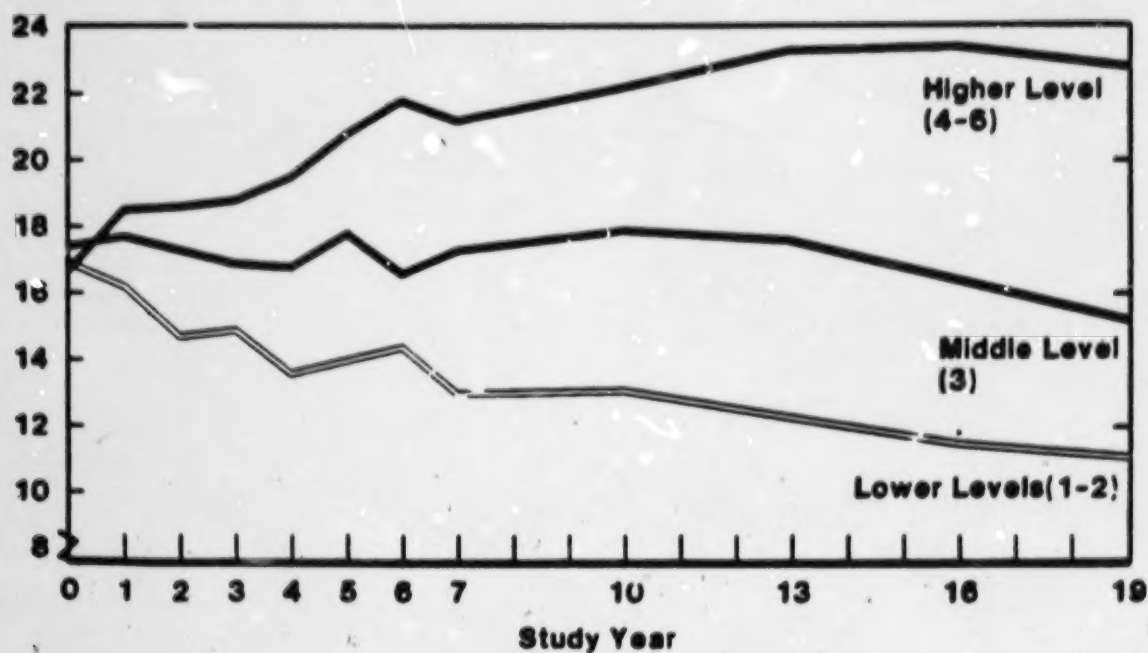
FEELINGS ABOUT A PROPOSED RELOCATION FOR A LATERAL TRANSFER

MPS ACTIVES AT YEAR 20, N=120

	<u>Individual Reactions</u>	<u>Family Reactions</u>
Favorable	10%	8%
Mixed	15%	21%
Unfavorable	75%	71%

OCCUPATIONAL LIFE THEME MPS 19TH YEAR ACTIVES, N=283

CF1602,102



BELL ADVANCED MANAGEMENT PROGRAM (BAMP)

SAMPLE CHARACTERISTICS

	<u>BAMP</u>	<u>MPS:20</u>
Sample Size	71	270
White Males	93%	100%
Age (Median)	41 Yrs.	47 Yrs.
Bell System Tenure (Median)	17 Yrs.	20 Yrs.
Management Level (Mode)	5th	3rd

HOW SOON DO YOU EXPECT YOUR NEXT PROMOTION TO OCCUR?

	<u>BAMF</u>	<u>MPS:20</u>
Less Than A Year	22%	2%
1-3 Years	64%	19%
4 Years Or More	13%	17%
Never	1%	62%
	<u>100%</u>	<u>100%</u>

Mean Difference $p < .001$

IMPORTANCE OF ADVANCEMENT ONE LEVEL HIGHER

	<u>BAMP</u>	<u>MPS:20</u>
Extremely Important	18%	4%
Very Important	40%	12%
Moderately Important	28%	30%
Slightly Important	11%	22%
Not Important	3%	32%
	<u>100%</u>	<u>100%</u>

Mean Difference $p < .001$

CD1602,109

WILLINGNESS TO GIVE MORE PERSONAL TIME FOR CAREER SUCCESS

	<u>BAMP</u>		<u>MPS:20</u>
<u>Very Willing To Spend More Time</u>			
• On The Job	58%	*	36%
• Working At Home	48%	**	23%
• Taking Course Work	61%	**	32%

Mean Differences * $p < .01$, ** $p < .001$

FEELINGS ABOUT A PROPOSED RELOCATION

BAMP MANAGERS

	<u>Promotion Involved</u>	<u>Lateral Transfer</u>
Favorable	59%	11%
Mixed	17%	20%
Unfavorable	24%	69%
	<u>100%</u>	<u>100%</u>